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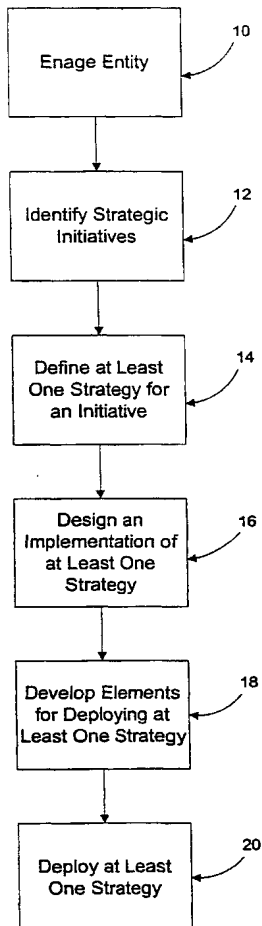
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- (21) International Application Number: **PCT/US00/23567** (72) Inventor: **SHARMAR, Panna**; 1280 Stillwood Drive, NE, Atlanta, GA 30306 (US).
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(54) Title: **SYSTEM AND METHOD FOR IDENTIFYING AND PRIORITIZING STRATEGIC INITIATIVES**

(57) Abstract: A process and system for engaging an entity (10) and identifying and prioritizing strategic initiatives (12), such as Internet initiatives is disclosed. A session plan for engaging an entity (10) to identify the strategic initiatives (12) is created and implemented. Using various information about the entity, the initiatives are prioritized, and strategies for developing and implementing (16) the initiatives are created.



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## SYSTEM AND METHOD FOR IDENTIFYING AND PRIORITIZING STRATEGIC INITIATIVES

### **Field of the Invention**

5 The present invention relates generally to a method and system for identifying and prioritizing initiatives, and more particularly, the invention relates to identifying and prioritizing strategic internet initiatives within an organization while avoiding project drift away from important aspects of the project.

### **Background of the Invention**

10 As the Internet becomes an increasingly important area of the business world, many companies with traditional businesses are looking to add Internet initiatives. These companies, however, may lack experience in the Internet area. Company managers, while knowledgeable about more traditional business decision making processes, may lack knowledge for translating their business into the Internet.

15 Additionally, new technology, functionality and features are continually added to the Internet. As companies began to implement initiatives on the Internet, "feature creep" may become a danger. "Feature creep" may result when an initiative is created, and new functions are added as to the initiative is implemented. These new functions are often added with little or no thought as to how the new functions will effect the initiative.

20 These and other drawbacks may be present.

### **Summary of the Invention**

An object of the present invention is to overcome these and other drawbacks in existing systems and methods.

25 Another object of the invention is to provide a system and methodology for assisting an entity in identifying and prioritizing initiatives.

Another object of the invention is to provide a system and methodology for quantitative analysis of an initiative to determine the value of the initiative to an entity.

Additional objects and advantages of the invention will be set forth in part in the description, or may be learned by practice of the invention. The objects and advantages of the invention may be realized and attained by means of instrumentalities and combinations particularly pointed out in the appended claims.

To achieve these objects and in accordance with the purpose of the invention, as embodied and broadly described herein, a process for prioritizing strategic initiatives within an organization, where the comprises identifying a plurality of initiatives within the organization, gathering information regarding each of the plurality of initiatives, defining at least one strategy based on the gathered information, designing specifications for implementing the at least one strategy, developing at least one element for implementation of the at least one strategy, and deploying the element for implementation of the at least one strategy.

To further achieve these objectives and advantages, the present invention provides a process for engaging an entity to determine one or more strategic initiatives by assigning a coordinator to engage the entity comprises gathering information about the entity, determining a session type for enabling the entity and coordinator to determine the one or more strategic initiatives, allocating at least one resource to the determined session type, allocating roles to the coordinator, the resource, and at least one person from the entity, wherein the roles are performed during the session, assembling a plan for implementing the determined session, and implementing the determined session, wherein implementation comprises using the gathered information, the at least one resource, the allocated roles, and the assembled plan.

To still further achieve these objectives, the present invention provides a system for prioritizing strategic initiatives within an organization comprising an identification module for identifying a plurality of initiatives within the organization, an information module for gathering information regarding each of the plurality of initiatives, a strategy module for defining at least one strategy based on the gathered information, a design module for designing specifications for implementing the at least one strategy, a development module for

developing at least one element for implementation of the at least one strategy, and a deployment module for deploying the element for implementation of the at least one strategy.

To still further achieve these objectives, the present invention provides a system for engaging an entity to determine one or more strategic initiatives by assigning a coordinator to engage the entity comprises an information module for gathering information about the entity, a session module for determining a session type for enabling the entity and coordinator to determine the one or more strategic initiatives, a resource module for allocating at least one resource to the determined session type, a role module for allocating roles to the coordinator, the resource, and at least one person from the entity, wherein the roles are performed during the session, a plan module for assembling a plan for implementing the determined session, and an implementation module for implementing the determined session, wherein implementation comprises using the gathered information, the at least one resource, the allocated roles, and the assembled plan.

The accompanying drawings, which are incorporated in and constitute a part of this specification, illustrate an embodiment of the invention and, together with the description, serve to explain the principles of the invention.

#### **Brief Description of the Drawings**

Figure 1 is a flowchart illustrating the steps of a process for prioritizing strategic initiatives according to an embodiment of the invention.

Figure 2 is a flowchart illustrating the steps of a process for engaging an entity according to an embodiment of the invention.

Figure 3 is an example graphic user interface for a strength model according to an embodiment of the invention.

Figure 4 is a schematic illustration of a system for identifying and prioritizing strategic initiatives according to an embodiment of the invention.

**Detailed Description of the Preferred Embodiments**

Reference will now be made in detail to the present preferred embodiment of the invention, an example of which is illustrated in the accompanying drawings, in which like reference characters refer to  
5 corresponding elements.

Fig. 1 is a flowchart illustrating a process for prioritizing initiatives according to an embodiment of the invention. It is understood that while the present invention is described in the context of developing and implementing initiatives in the Internet, it is equally applicable to non-Internet initiatives.

10 At step 10, an entity may be engaged in the process of the present invention, including identifying one or more strategic initiatives (also referred to as "initiatives") within an entity. At step 12, information about the identified initiatives and the entity or entities responsible for the initiatives is gathered, distilled, and communicated. Although an embodiment of the present invention  
15 is described with respect to an entity, such as a business corporation, it is understood that various aspects of the invention may be used with other types of entities or organizations, such as a non-profit organization, a sole proprietorship, a partnership, a educational institution, or other entity which desires to prioritize its initiatives. The information may be any information  
20 necessary to respond effectively to a given challenge. At step 14, at least one strategy for implementing the strategic initiative is defined based on the gathered information. The strategy may include an interactive business strategy, a mission statement for a particular engagement, and any supporting goals, benefits, and/or objectives.

25 At step 16, specifications for implementing the at least one strategy are designed. Designing specifications may include creating supporting documentation and specifications needed to achieve an interactive business strategy, a mission statement, supporting goals, benefits, and/or objectives, such as an interactive design specification. One or more elements for implementing  
30 the strategy are developed at step 18. Implementation may include implementing all elements of an engagement based on design documentation,

including elements of strategy, creativity, engineering, and integration. At step 20, one or more elements for implementation of one or more strategies are deployed. The steps will now be described in more detail below.

At step 10, an entity engages in the process of the present invention, including identifying strategic initiatives. According to an embodiment of the invention, an entity engaging in the process may perform information audits regarding various aspects of the entity. Engaging in identifying strategic initiatives will be described in greater detail below with respect to Fig. 2.

An entity may perform information audits within the entity's areas of interaction, including information audits of the entity itself, core offerings, product and service offerings of the entity, the entity's channels of distribution of the information, products and services, the entity's internal and external customers, and the entity's competitors. Information audits about the entity may include issues about operations, service, and delivery models, staffing, workflow, resource management, and systems. Core offerings may include information regarding issues with pricing, products, services and information, configuration, and brand propositions. An information audit regarding customers may include issues about the definition of customers, segmentation, management, and growth. Information about channels may include issues with distribution, value-added reselling, identification, and management. An information audit regarding competition may include issues about competencies, horizontal and vertical extension, business intelligence, and benchmarking. The areas of interaction may be both the current areas of interaction, and the entity's goals for areas of interaction. By way of example, an entity may perform an information audit on both its current competitors, as well as those entities it views as its competitors in five years. Other manners of information audits may also be performed.

Potential initiatives may be identified based on information discovered. Realistic initiatives may be identified by measuring a variety of factors required to achieve the initiative, including the effort, organizational readiness, and the financial commitment. According to an embodiment of the invention, each

strategic initiative may be rated (*e.g.*, a scale of 1 to 10) in various terms, such as scope, difficulty, initiation, effort, and financial commitment, where the ratings are then combined to provide a strategic initiative score. Using a strategic initiative score may allow for a quantitative evaluation of each strategic initiative. According to an embodiment of the invention, a strategic initiative above or below a certain strategic initiative score may be set aside, such as for special attention or to ensure that no further resources are devoted to the initiative. Initiatives may be prioritized based on business impact, including revenue growth, cost impacts, and effects on customer relationships. Further, initiatives may be prioritized based on a consensus view of the relative importance of the initiative. Other business impact criteria may also be used to evaluate and prioritize initiatives.

At step 12, initiatives within an entity or organization are identified, and information about the identified initiatives and the entity responsible for the initiatives is gathered. Information may include sales and marketing information, relationship management information (*e.g.*, organizational charts, annual reports, the competitive landscape for the entity, *etc.*), training manuals, documentation of existing customer operations (*e.g.*, current web site, call centers, *etc.*), functional specifications for existing technology, and/or other information. Information may also include learning the entity's corporate culture, such as how various portions of an entity function, how the entity was formed, the entity's mission statement, and other information about how the entity works.

Various personnel of an entity, including management personnel, may be interviewed to provide information. According to an embodiment of the invention, an initiative worksheet may be completed during the interview. An initiative worksheet may provide a road map to guide an interview, while providing a strategic interviewer with the ability to explore tangential issues that are still relevant to an initiative. Employees interviewed may include marketing employees, employees involved in creative development, technical



employees, or other employees with information regarding one or more initiatives.

Using this information, further information may be generated by identifying strategy and goals for the entity, as well as articulating business requirements, entity expectations, and issue assumptions. Business requirements may include any requirements the entity has, such as contractual business requirements, internal business goals, internal procedures and other requirements. Expectations may include determining what the entity expects from the process, whether it is monetary savings, greater speed to market, increases in revenue, greater efficiency, or other expectations. Issue assumptions may include unstated or down-played assumptions that may turn out to be important to the entity. By way of example only, an entity may have an unstated assumption that a certain profitability level (*e.g.*, 8%) is required for all new products or ventures. Additionally, current practices and technologies of an entity may be evaluated. All of this information may be used to prioritize the strategic initiatives for the entity.

Gathering information may include meeting with an entity's personal to discuss the information needed, requesting documents with the relevant information, researching competitors and customers (both external and internal) of the entity, and other gathering methods. By gathering the information, a clear idea of the direction that an opportunity or opportunities will take an entity and a strategic initiative may be established.

At step 14, at least one strategy for implementing one or more strategic initiatives is defined based on the gathered information. The strategy may include an interactive business strategy, a mission statement for a particular engagement, process or product, and/or any supporting goals, benefits, and/or objectives. Defining a strategy may include determining one or more personnel who are responsible for defining the strategy. The personnel may be from within the entity, from a third party (*e.g.*, a consultant, a customer), a combination, or some other individuals. Personnel may create a "mission statement" document, such as a "mission statement" interactive business

strategy document for setting forth the main goals of the defined strategy. A “mission statement” document may be any type of “mission statement” used within an entity to provide high-level direction for an organization, an individual or a project. Other types of interactive business strategy documents may also be used.

Various components of the strategy are normally defined within the process of the present invention. These components may include one or more schedules, budgets, scopes, assumptions, dependencies, requirements, metrics, acceptance criteria, and other components typically associated with a strategy. The schedule for completing a strategy, the budget allotted for the strategy, and the scope covered by the strategy may be standard within any strategy. Assumptions may include specifically stating any assumptions made while defining a strategy. Certain requirements may be needed for any particular strategy, whether internally or externally driven. By way of example, an entity may require that any strategy comply with certain employee input criteria, as well as customer input criteria. Defining a strategy may thus include factoring in the employ and customer input required by the entity.

Dependencies associated with a strategy for implementing a strategic initiative may include other areas on which the strategy depends. By way of example, certain aspects of a strategy may depend on outside parties meeting deadlines or goals (*e.g.*, an advertising firm providing an advertising campaign for implementing a new strategy). Identifying dependencies may assist in defining other components of a strategy, including, but not limited to, budget and scheduling.

Initially, defining acceptance criteria initially may allow an entity to set goals for a strategy, and related components and/or products, before actual implementation of the strategy. Defining acceptance criteria before creation may prevent “feature creep,” whereby features are added and/or deleted (*e.g.*, slowly one by one) from a strategy as the strategy is designed and implemented. “Feature creep” may result in a different type of strategy at the end of a process than originally contemplated in the beginning of the process.

Defining the strategy may also include defining benefits and deliverables associated with the strategy. Defining the deliverables may also aid in preventing “feature creep.” Defining deliverables may also aid in communicating with and within an entity, such as when a third party (*e.g.*, a consultant) is providing a strategy for an entity. Defining deliverables may set expectations for an entity by indicating what to expect from the process of the present invention. An entity may better assess the cost and benefits associated with a strategy after the benefits and risks for that strategy have been defined. This may allow an entity to determine whether to move forward with a strategy, redefine the strategy, or abandon the strategy altogether.

According to an embodiment of the invention, an entity may define business objectives, including business strategy, marketing strategy, creative strategy, content and user experience strategy, technical strategy, and a project plan for a design phase. As described above, a business strategy may include an Internet mission statement, return on investment (ROI) objectives, process objectives, cost savings objectives, and marketing audience objectives. An analysis of a business strategy may also include evaluating benefits and financial implications, including an overview of the financial impact of development, such as a web site development. An overview may involve examining costs, both internal and external, associated with the development.

In analyzing business strategy, organizational requirements may be evaluated, such as the suggested structure of the personnel involved in the process (*e.g.*, the team working on the process), business constraints, existing partnerships and synergies,

At step 16, specifications for implementing the at least one strategy are designed. According to an embodiment of the invention, designing specifications may include creating supporting documentation and specifications needed to achieve an interactive business strategy, a mission statement, supporting goals, benefits, and/or objectives, such as an interactive design specification. A prototype, storyboard, or creative brief may be created to aid in implementing and designing one or more strategies. Detailed

workplans and process flowcharts may also be created for designing and implementing the strategies. Specifications for an Internet based strategy may include the interactive design specifications for a web site (*e.g.*, screen layout, “look and feel,” *etc.*), the workflow between screens, schematic representation of functionalities associated with the web site, and other details for designing the web site. Other specifications may also be designed.

One or more elements for implementing the strategy are developed at step 18. Implementation may include implementing all elements of an engagement based on design documentation, including elements of strategy, creativity, engineering, and integration. Elements may be developed, including code (if in a software or Internet format), test plans, and documentation related to the elements. Documentation may include the functional specifications, user manuals and instructions, and other documents. Development may also include developing a user interface tool (*e.g.*, and extranet tool for an entity to access) for an entity to implement a strategy, or elements of a strategy, in a web site. During the development of the strategy and the elements of the strategy, feedback from various personnel, including the entity, may be obtained regarding portions of the strategy and the strategy elements being developed. Based on the approval and feedback, the strategy and strategy elements may be altered or modified. Software developed may include standard “alpha” and “beta” testing of the strategy and/or elements to ensure that all requirements and specifications are met.

Once fully developed, a strategy and elements associated with the strategy may be prepared for implementation, including developing testing, staging, and deployment components. Testing components may be based on initial acceptance criteria, and assure that the strategy comports with the strategy as initially defined. Staging and deployment components may be developed for implementation of the strategy and strategy elements. Staging may include indicating what portions or divisions of an entity are responsible for deploying a strategy. By way of example only, an entity may be a corporation with offices in several major cities. Staging may involve

coordinating the deployment of a strategy. Each office may receive one or more elements for deployment, as well as a schedule and instructions regarding how and when to deploy the strategy. Staging may also include providing an opportunity for an entity, a particular office, entity personnel, or others to work  
5 with a strategy before deploying the strategy on a wide-scale basis.

At step 20, the element for implementation of one or more strategies are deployed. According to an embodiment of the invention, deployment of a strategy may include creating training documentation for the strategy and elements of the strategy, performing acceptance testing using the defined  
10 acceptance testing criteria, receiving feedback from others (*e.g.*, entity, entity personnel, customers, third parties, *etc.*), initiating a press release for the entity, executing market services, and measuring, monitoring and reporting on requests for information about the strategy. Deployment may also include proposing enhancements and identifying areas of improvement for a strategy. By way of  
15 example only, a strategy for an entity may be deployed and running for six months. Based on customer and end user feedback, proposed enhancements and improvements may be identified. The entity may then evaluate the proposals, and determine whether to modify the strategy per one or more of the proposals. Other processes may also be used in deployment of a strategy.

20 The process of the present invention may include a tools-based approach to divide and invest ownership of a portion of the process directly into the hands of those performing the processes. According to an embodiment of the invention, a tools-based approach may be used in the context of Internet technology which allows the development of scalable processes. By way of  
25 example, for an entity with a group of individuals (*e.g.*, a team) assigned to perform the process, each step with the process of the present invention may be assigned to a particular individual on the team. According to an embodiment of the invention, each step is represented by a tool (*e.g.*, a checklist, a template, a framework, clearance, *etc.*). Each tool is assigned to an individual, but the  
30 content of that tool may be made available to others on the team for review. By

assigning ownership of a tool, the individual is fully responsible for implementation of the tool.

5 A common set of tools may be used throughout the entity, thereby enabling a standardization of the process. Each tool may also create its own documentation, such as a staging site recording all versions, comments and revisions added, or a schedule site recording all changes, comments, and compliance with the schedule. According to an embodiment of the invention, results yielded by each tool may be quantifiable as opposed to subjective. Quantifiable results allow an individual to ensure that the results are acceptable, and not subject to interpretation of others. According to another embodiment of the invention, a tool may enable an individual to review and optimize a step in real-time, such as by automatically changing architecture. By enabling others to access the tool, and its content, the proper parties may review the step in the process of the present invention and provide comment and/or approval. The contents of the tool may be displayed so that the status is apparent to those reviewing the content. By way of example only, particular tools may include an entity profiling database, a status reports template, a centralized training program, a mission statement, a contract template, a glossary of documents, risk management and assessment, a schedule, a budget, development training, a deployment plan, an entity feedback template, a strategy tracking tool, or other tools. Other manners for implementing and manipulating a tool may also be used.

25 The present invention may be used with a wide variety of concepts. By way of example, an entity may use the process for strategic initiatives, creative and technical development, marketing and sales issues, and other areas. The present invention enables an entity to focus on issues important to that entity, thereby aiding in efficiently generating solutions and leveraging the best practices of all aspects of the entity.

30 Fig. 2 is a flowchart illustrating a process for engaging an entity according to an embodiment of the invention. At step 50, one or more coordinators are assigned to a entity. According to an embodiment of the

invention, a coordinator may be in charge of engaging a entity and responsible for coordinating activities involved with the engagement. A coordinator may be a person within the entity (*e.g.*, an employee), or may be from an outside party (*e.g.*, a consultant).

5           At step 52, information about an entity may be obtained. As described above with respect to Fig. 1, an entity may perform information audits regarding various aspects of the entity. Information audits may be performed within the entity's areas of interaction, including information audits of the entity itself, the core information, product and service offerings of the entity,  
10       the entity's channels of distribution of the information, products and services, the entity's internal and external customers, and the entity's competitors. Information audits about the entity may include issues about operations, service, and delivery models, staffing, workflow, resource management, and systems. Core offerings may include information regarding issues with pricing,  
15       products, services and information, configuration, and brand propositions. An information audit regarding customers may include issues about the definition of customers, segmentation, management, and growth. Information about channels may include issues with distribution, value-added reselling, identification, and management. An information audit regarding competition  
20       may include issues about competencies, horizontal and vertical extension, business intelligence, and benchmarking. The areas of interaction may be both the current areas of interaction, and the entity's goals for areas of interaction. By way of example, an entity may perform an information audit on both its current competitors, as well as those entities it views as its competitors in five  
25       years. Other manners of information audits may also be performed.

Potential strategic initiatives may be identified based on information discovered. Realistic initiatives may be identified by measuring a variety of factors required to achieve the initiative, including the effort, organizational readiness, and the financial commitment. According to an embodiment of the  
30       invention, each initiative may be rated (*e.g.*, a scale of 1 to 10) in various terms, such as scope, difficulty, initiation, effort, and financial commitment, where the

ratings are then combined to provide an initiative score. Using an initiative score allows for a quantitative evaluation of each initiative. According to an embodiment of the invention, initiatives above or below certain initiative scores may be set aside, such as for special attention or to ensure that no further resources are devoted to the initiative. Initiatives may be prioritized based on business impact, including revenue growth, cost impacts, and effects on customer relationships. Further, initiatives may be prioritized based on a consensus view of the relative importance of the initiative. Other business impact criteria may also be used to evaluate and prioritize initiatives.

At step 54, a coordinator determines the type of session to be used by an entity. According to an embodiment of the invention, based on the information gathered regarding the entity, the coordinator may determine the type of session, and any session characteristics. Session types may include the session perspective (*e.g.*, qualitative vs. quantitative mindset, brainstorming needs vs. project planning), case studies to be reviewed, tool sets to be used, and other types. Other characteristics may also be determined, including, but not limited to, session length and session deliverables.

At step 56, resources for a session are allocated. According to an embodiment of the invention, a coordinator may allocate the appropriate resource to a session, based on the session type and session characteristics. Session resources may include personnel associated with an entity, such as employees, management, marketing, technology and project members. Other resources may include third party resources (*e.g.*, consultant resources), such as experts, technology consultants, and other personnel.

At step 58, roles are allocated. According to an embodiment of the invention, a coordinator may allocate roles to appropriate personnel, whether personnel from the entity, or personnel from a third party. Allocating roles may include allocating work assignments and responsibilities, such as requesting and coalescing information, determining and preparing session logistics, providing initial ideas for possible initiatives, providing information (*e.g.*,



corporate data, market research, *etc.*), and contact information for session participants.

At step 60, a session plan is assembled. According to an embodiment of the invention, a coordinator may prepare a session plan and timeline. A session  
5 plan may include tools, a methodology, and a type of interactivity to be used. A session timeline may include indicating session objectives and the time and/or date to be accomplished, the time and/or date a tool will be used, and other time and/or date milestones.

At step 62, a session is implemented. According to an embodiment of  
10 the invention, the determined session may be implemented based on information gathered, session characteristics, and other aspects used in designing a session.

Another aspect of the present invention relates to a strength model for an entity to better understand economic forces that effect the entity. By way of  
15 example, for an entity investigation internet initiatives may use a strength model to determine the impact of the initiatives on digital competitiveness, digital value proposition, operating earnings, and market value (*e.g.*, shareholder value). Each area of impact may in turn have drivers. By way of this continued example, digital competitiveness may be driven by force of  
20 entry, uniqueness and speed to market. Force of entry may include how the initiative increases the presence of the entity, how dedicated the entity is to the initiative, and how the initiative leverages the Internet to the benefit of other areas of the entity. Uniqueness may include whether the offering is different and whether the entity is the first into the area. Speed to market may include  
25 how quickly the initiative can be brought to market and how quickly the initiative will spread. A digital value proposition may be driven by the amount of value conferred, the degree of relationship enhancement, and the degree of brand enhancement. The amount value conferred may include the total value to the entity conferred by the initiative. Relationship enhancement may include  
30 the enhancement of relationships between an entity, employees, customers, clients, suppliers and others. Brand enhancements may include enhancements

to both existing and future brands of an entity. Operating earnings may be driven by revenue increases resulting from the initiative, expense reductions resulting from the initiative, and sustained earnings from the initiative. Impact on market value may be driven by increased customer and shareholder loyalty and greater market share.

By evaluating initiatives under a strength model, an entity may better determine which initiatives to pursue immediately, which initiatives to wait to pursue, and which initiatives to reject completely. Using a strength model, an entity may take previous assumptions and hypotheses, evaluate them, and determine actionable initiatives and plans.

According to an embodiment of the invention, a strength model may include assigning a quantitative score to each driver to allow for such an assessment. As illustrated by way of example in Fig. 3, an entity may assign a score of one to five for each driver of an economic force, where five indicates the greatest value and one indicates the least value to the entity. The entity may determine the score for the drivers for digital competition, digital value, operating earnings, and market capitalization. Chart 100 illustrates the a strength module, where a weighting component is also used. For example, in determining the digital competitiveness, the scores may be multiplied by two.

In determining the digital competition of Initiative A, force may be assigned a value of "5," uniqueness may be assigned a value of "5," and time to market may be assigned a value of "1" at square 102. Further, the average of the values may be determined as 3.7, while the weighted average may be determined as 7.4. This process may be continued with the digital value at square 104, the operating earnings at square 106 and the market capitalization at square 108. At square 110, the total value of Initiative A is calculated by adding the average values for each economic force. The total value may include the non-weighted value and the weighted value. Comparing the total weighted value of Initiative A, as shown in square 110, with the total weighted value of Initiative B, as shown in square 112, an entity may determine that Initiative A, with a weighted value of 32.3, is of greater value than Initiative B,

with a weighted value of 30.2. Other weightings and assignment of values may also be used.

Figure 4 illustrates a System 300 according to an embodiment of the present invention. Various personnel involved in identifying and prioritizing strategic initiatives may use System 300 to interact, such as by gathering information, creating schedules, enabling tools to be accessed by other personnel, and other portions of the process. System 300 comprises multiple requester devices 305 (or "computers") used by requesters to connect to Network 302 through multiple Connector Providers (CPs) 210. Network 302 may be any network that permits multiple requesters or computers to connect and interact. According to an embodiment of the invention, Network 302 may be comprised of a dedicated line to connect requester, such as the Internet, an intranet, a local area network (LAN), a wide area network (WAN), a wireless network, or other type of network. CP 310 may be a provider that connects the requesters to the network 302. For example, CP 310 may be an internet service provider (ISP), a dial-up access means, such as a modem, or other manner of connecting to network 302. In actual practice, there may be significantly more users connected to System 300 than shown in Fig. 4. This would mean that there would be additional requesters which are connected through the same CPs shown or through other CPs. Nevertheless, for purposes of illustration, the discussion will presume four requester devices 305 are connected to Network 302 through two CPs 310.

According to an embodiment of the invention, requester devices 305a - 305d may each make use of any device (*e.g.*, computer, wireless telephone, personal digital assistant, *etc.*) capable of accessing Network 302 through CP 310. Alternatively, some or all of requester devices 305a - 305d may access Network 302 through a direct connection, such as a T1 line, or similar connection. Fig. 3 shows four requester devices 305a - 305d, each having a connection to Network 302 through a CP 310a and 310b. Requester devices 305a - 305d may each make use of a personal computer such as a computer located in the requester's home, or may use other devices which allow the

requester to access and interact with others on Network 302. Central controller module 312 may also have a connection to Network 302 as described above. Central controller module 312 may communicate with one or more data storage modules 314, the latter being discussed in more detail below.

5           Each computer 305a - 305d used by requesters may contain a processor module 304, a display module 308, and a user interface module 306. Each computer 305a-305d may have at least one user interface module 306 for interacting and controlling the computer. The user interface module 306 may be comprised of one or more of a keyboard, joystick, touchpad, mouse, scanner or  
10           any similar device or combination of devices. Each of the computers 305a-305d used by requesters may also include a display module 308, such as a CRT display or other device.

          System 300 further includes a central controller module 312. Central controller module 312 may maintain a connection to Network 302 such as  
15           through transmitter module 318 and receiver module 320. Transmitter module 318 and receiver module 320 may be comprised of conventional devices which enable central controller module 312 to interact with Network 302. According to an embodiment of the invention, transmitter module 318 and receiver module 320 may be integral with central controller module 312. The connection to  
20           Network 302 by central controller module 312 and computers 305 may be a high speed, large bandwidth connection, such as a though T1 or T3 line, a cable connection, a telephone line connection, DSL connection, or other type connection. Central controller module 312 functions to permit requester's devices 305a-305d to interact with each other in connection with various  
25           applications, messaging services and other services which may be provided through System 300. Central controller module 312 may perform various calculations, such as calculating a strength model, or determining a rating for a strategic initiative.

          Central controller module 312 preferably comprises either a single  
30           server computer or a plurality of multiple server computers configured to appear to clients 305 as a single resource. Central controller module 312

communicates with a number of data storage modules 314. Each data storage module 314 stores various information associated with a website and webpages, including multimedia content, formatting, audio and video components, among other information. According to an embodiment of the invention, any data storage module 314 may be located on one or more data storage devices, where the data storage devices are combined or separate from central controller module 312.

Processor module 316 performs the various processing functions required in the practice of the process taught by the present invention, such as performing the search, generating the search results, generating a message to be sent and displayed for the requester (*e.g.*, message 220 in Fig. 2b), and other similar processing functions. Processor module 316 may be comprised of a standard processor, such as a central processing unit (CPU), which is capable of processing the information in the necessary manner.

While system 300 of Fig. 3 discloses a computer 305 connected to Network 302, it is understood that a personal digital assistant ("PDA"), a mobile telephone, a television, or other device that permits access to Network 302 may be used to arrive at the system of the present invention.

According to another embodiment of the invention, a computer-usable and writable medium having a plurality of computer readable program code stored therein may be provided for practicing the method of the present invention. For example, the computer-usable medium may comprise a CD ROM, a floppy disk, a hard disk, or any other computer-usable medium. One or more of the components of the system may comprise computer readable program code in the form of functional instructions stored in the computer-usable medium such that when the computer-usable medium is installed on a computer system, those components cause the computer system to perform the functions described.

According to one embodiment, central controller module 312, data storage 314, processor module 316, receiver module 318, and transmitter module 320 may comprise computer-readable code that, when installed on a

computer, perform the functions described above. Also, only some of the components may be provided in computer-readable code.

According to one specific embodiment of the present invention, the system may operate on a network and may be connected to other systems sharing a common database. Other hardware arrangements may also be used.

Other embodiments, uses and advantages of the present invention will be apparent to those skilled in the art from consideration of the specification and practice of the invention disclosed herein. The specification and examples should be considered exemplary only. The intended scope of the invention is only limited by the claims appended hereto.

**What is Claimed is:**

1. A process for prioritizing strategic initiatives within an organization comprising:
  - 5 identifying a plurality of initiatives within the organization;
  - gathering information regarding each of the plurality of initiatives;
  - defining at least one strategy based on the gathered information;
  - designing specifications for implementing the at least one strategy;
  - developing at least one element for implementation of the at least one
  - 10 strategy; and
  - deploying the element for implementation of the at least one strategy.
2. The process according to claim 1, wherein the information for each of the plurality initiatives comprises at least one of:
  - a) the entities business requirements;
  - 15 b) the entities corporate culture;
  - c) the entities sales goals;
  - d) the projects related to the initiative; and
  - e) competitors of the entity.
3. The process according to claim 1, wherein the step of defining at least
- 20 one strategy further comprises the steps of:
  - defining the benefits of the strategy;
  - defining the deliverables for the strategy; and
  - assessing the initial risk associated with the strategy.
4. The process according to claim 1, wherein the step of designing the
- 25 specifications for the at least one strategy further comprises the steps of:
  - generating a detailed process flowchart;
  - creating a user schematic desk;
  - creating interactive design specifications;
  - analyzing risks associated with the at least one strategy based on the
  - 30 designed specifications; and
  - defining at least one final performance measurement.

5. The process according to claim 1, wherein the step of developing at least one element for implementation of the at least one strategy further comprises the steps of:

creating a test plan;

5 producing the at least one element for implementation of the at least one strategy; and

creating a deployment plan for the at least one element.

6. The process according to claim 1, wherein deploying the element for implementation of the at least one strategy further comprises the steps of:

10 creating at least one training document for the entity;

performing an acceptance test for the element; and

implementing the at least strategy.

7. The process according to claim 6, further comprising the steps of:

15 obtaining feedback regarding the functionality of the at least one strategy; and

modifying the at least one strategy based on the feedback.

8. A process for engaging an entity to determine one or more strategic initiatives by assigning a coordinator to engage the entity, comprising the steps of:

20 gathering information about the entity;

determining a session type for enabling the entity and coordinator to determine the one or more strategic initiatives;

allocating at least one resource to the determined session type;

25 allocating roles to the coordinator, the resource, and at least one person from the entity, wherein the roles are performed during the session;

assembling a plan for implementing the determined session; and

implementing the determined session, wherein implementation comprises using the gathered information, the at least one resource, the allocated roles, and the assembled plan.

30 9. The process according to claim 8, wherein the gathered information comprises at least one of:



- a) the entities business requirements;
- b) the entities corporate culture;
- c) the entities sales goals;
- d) the projects related to the initiative; and
- 5 e) competitors of the entity.

10. The process according to claim 8, wherein the step of determining a session type further comprises at least one of:

- determining cases studies to be used;
- determining tool sets to be used;
- 10 determining the length of a session; and
- determining session deliverables.

11. The process according to claim 8, wherein the step of allocating at least one resource further comprises assigning at least one person to assist in the session.

15 12. The process according to claim 8, wherein the step of allocating roles further comprises allocating at least one:

- requesting and coalescing gathered information;
- determining and preparing session logistics; and
- providing contact information for session participants.

20 13. A system for prioritizing strategic initiatives within an organization comprising:

- an identification module for identifying a plurality of initiatives within the organization;
- an information module for gathering information regarding each of the plurality of initiatives;
- 25 a strategy module for defining at least one strategy based on the gathered information;
- a design module for designing specifications for implementing the at least one strategy;
- 30 a development module for developing at least one element for implementation of the at least one strategy; and

a deployment module for deploying the element for implementation of the at least one strategy.

14. The system according to claim 13, wherein the information for each of the plurality initiatives comprises at least one of:

- 5 a) the entities business requirements;
- b) the entities corporate culture;
- c) the entities sales goals;
- d) the projects related to the initiative; and
- e) competitors of the entity.

10 15. The system according to claim 13, wherein defining at least one strategy further comprises:

- defining the benefits of the strategy;
- defining the deliverables for the strategy; and
- assessing the initial risk associated with the strategy.

15 16. The system according to claim 13, wherein designing the specifications for the at least one strategy further comprises:

- generating a detailed process flowchart;
- creating a user schematic desk;
- creating interactive design specifications;
- 20 analyzing risks associated with the at least one strategy based on the designed specifications; and
- defining at least one final performance measurement.

17. The system according to claim 13, wherein developing at least one element for implementation of the at least one strategy further comprises at least one of:

- 25 creating a test plan;
- producing the at least one element for implementation of the at least one strategy; and
- creating a deployment plan for the at least one element.

30 18. The system according to claim 13, wherein deploying the element for implementation of the at least one strategy further comprises at least one of:

creating at least one training document for the entity;  
performing an acceptance test for the element; and  
implementing the at least strategy.

19. The system according to claim 18, further comprising:

5 obtaining feedback regarding the functionality of the at least one strategy; and

modifying the at least one strategy based on the feedback.

20. A system for engaging an entity to determine one or more strategic initiatives by assigning a coordinator to engage the entity, comprising:

10 an information module for gathering information about the entity;

a session module for determining a session type for enabling the entity and coordinator to determine the one or more strategic initiatives;

a resource module for allocating at least one resource to the determined session type;

15 a role module for allocating roles to the coordinator, the resource, and at least one person from the entity, wherein the roles are performed during the session;

a plan module for assembling a plan for implementing the determined session; and

20 an implementation module for implementing the determined session, wherein implementation comprises using the gathered information, the at least one resource, the allocated roles, and the assembled plan.

21. The system according to claim 20, wherein the gathered information comprises at least one of:

25 a) the entities business requirements;

b) the entities corporate culture;

c) the entities sales goals;

d) the projects related to the initiative; and

e) competitors of the entity.

30 22. The system according to claim 20, wherein determining a session type further comprises at least one of:

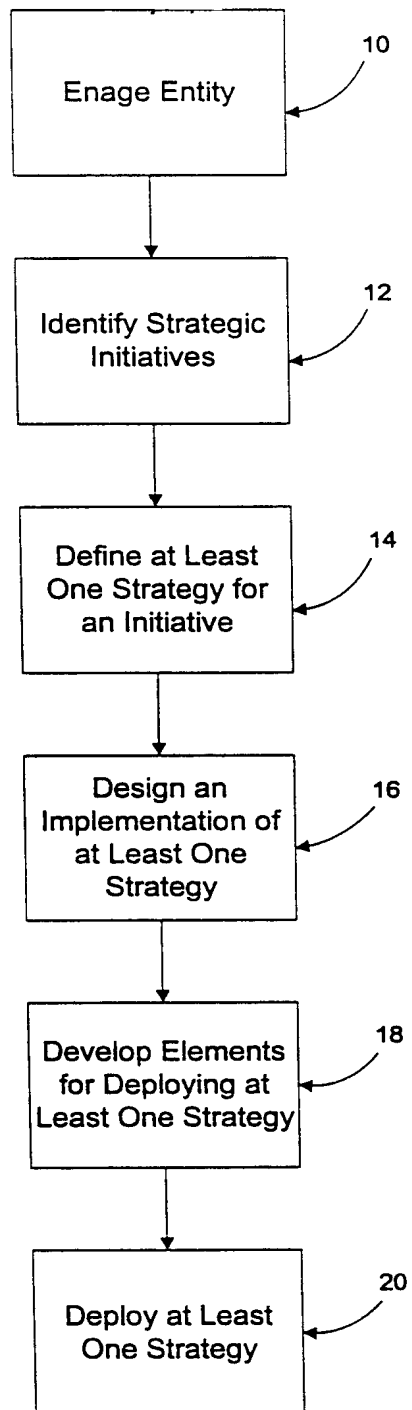
determining cases studies to be used;  
determining tool sets to be used;  
determining the length of a session; and  
determining session deliverables.

5       23.    The system according to claim 20, wherein allocating at least one resource further comprises assigning at least one person to assist in the session.

24.    The system according to claim 20, wherein allocating roles further comprises allocating at least one:

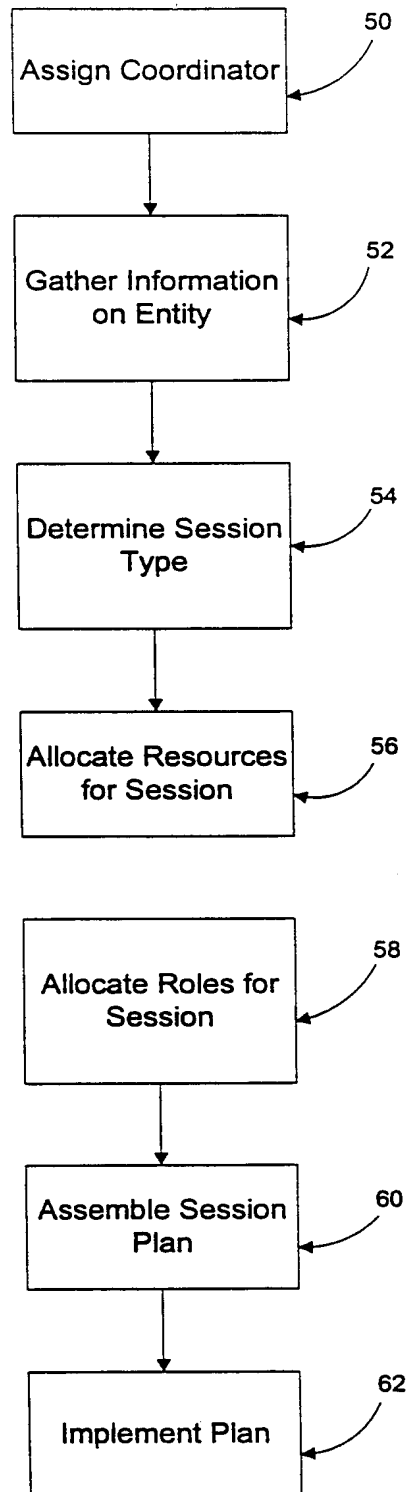
10       requesting and coalescing gathered information;  
determining and preparing session logistics; and  
providing contact information for session participants.

Fig. 1



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Fig. 2



Idea, Initiative	Digital Competition x 2 • Force • Uniqueness • Time to market	Digital Value (Internal & external) x3 • Level of value offered to customers • Scope of target segments focusing benefits • Customer relationship/attention enhancement • Brand enhancement	Operating Earnings x 2 • Revenue enhancement • Cost of reduction • Greater earnings sustainability	Market Cap x1 • Higher transactional potential • Greater mindshare or marketshare • Increased frequency and depth of customer contact	Total (rank) (no weighting) (with weighting)
Initiative A	<ul style="list-style-type: none"> <li>• Force - 5</li> <li>• Uniqueness - 5</li> <li>• Time to market - 1</li> </ul>	<ul style="list-style-type: none"> <li>• Level of value - 4</li> <li>• Scope of segments benefitting - 5</li> <li>• Relationship/attention enhancement - 4</li> <li>• Brand enhancement - 5</li> </ul> Ave - 4.5 With weighting - 13.5	<ul style="list-style-type: none"> <li>• Revenue enhancement - 3</li> <li>• Cost reduction - 3</li> <li>• Margin durability</li> </ul> Ave - 3.7 With weighting 7.4	Mkt. cap - 4 With weighting - 4	16.9 (1)  32.3 (1)
Initiative B	<ul style="list-style-type: none"> <li>• Force - 4</li> <li>• Uniqueness - 5</li> <li>• Time to market - 4</li> </ul> Ave - 4.3 With weighting 8.6	<ul style="list-style-type: none"> <li>• Level of value - 5</li> <li>• Scope of segments benefitting - 3</li> <li>• Relationship/attention enhancement - 5</li> <li>• Brand enhancement - 2</li> </ul> Ave - 3.8 With weighting - 11.4	<ul style="list-style-type: none"> <li>• Revenue enhancement - 1</li> <li>• Cost reduction - 5</li> <li>• Margin durability - 5</li> </ul> Ave - 3.6 With weighting - 3	Mkt. cap - 3 With weighting - 3	14.7 (2)  30.2 (2)

Fig. 3

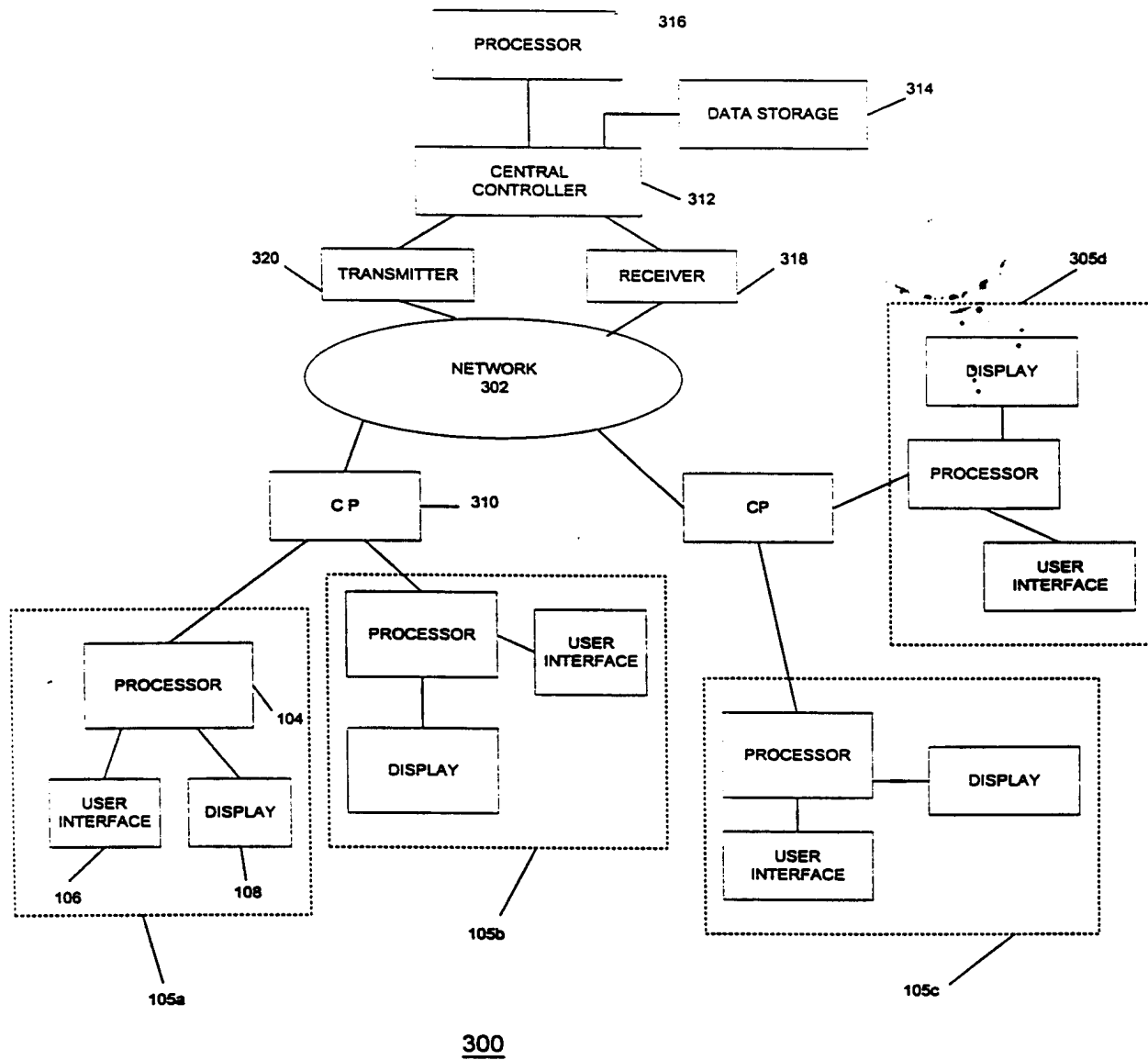


Figure 4



## INTERNATIONAL SEARCH REPORT

International application No.  
PCT/US00/23567

**A. CLASSIFICATION OF SUBJECT MATTER**

IPC(7) :G06F 17/60

US CL :705/7, 8, 9, 10

According to International Patent Classification (IPC) or to both national classification and IPC

**B. FIELDS SEARCHED**

Minimum documentation searched (classification system followed by classification symbols)

U.S. : 705/7, 8, 9, 10

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched

Electronic data base consulted during the international search (name of data base and, where practicable, search terms used)

WEST1.2, CAS ONLINE, DIALOG, IEEE

**C. DOCUMENTS CONSIDERED TO BE RELEVANT**

Category*	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
A	5,630,070 A (DIETRICH et al) 13 May 1997, see entire document.	1-24
A	US 5,875,431 A (HECKMAN et al) 23 February 1999, see entire document.	1-24
A	US 5,890,133 A (ERNST) 30 March 1999, see entire document.	1-24
A	US 5,845,258 A (KENNEDY) 01 December 1998, see entire document.	1-24

☐ Further documents are listed in the continuation of Box C. ☐ See patent family annex.

* Special categories of cited documents:	*T* later document published after the international filing date or priority date and not in conflict with the application but cited to understand the principle or theory underlying the invention
*A* document defining the general state of the art which is not considered to be of particular relevance	*X* document of particular relevance; the claimed invention cannot be considered novel or cannot be considered to involve an inventive step when the document is taken alone
*E* earlier document published on or after the international filing date	*Y* document of particular relevance; the claimed invention cannot be considered to involve an inventive step when the document is combined with one or more other such documents, such combination being obvious to a person skilled in the art
*L* document which may throw doubts on priority claim(s) or which is cited to establish the publication date of another citation or other special reason (as specified)	*G* document member of the same patent family
*O* document referring to an oral disclosure, use, exhibition or other means	
*P* document published prior to the international filing date but later than the priority date claimed	

Date of the actual completion of the international search  
31 OCTOBER 2000

Date of mailing of the international search report  
**28 NOV 2000**

Name and mailing address of the ISA/US  
Commissioner of Patents and Trademarks  
Box PCT  
Washington, D.C. 20231  
Facsimile No. (703) 305-3230

Authorized officer

TARIQ R. HAFIZ

Telephone No. (703) 305-9643

